



DIFP

Department of Insurance,
Financial Institutions &
Professional Registration

JOB OPENING

TITLE: Examination Coordinator

LOCATION: Division of Insurance Company Regulation
Jefferson City, Missouri

MINIMUM SALARY: \$28,769 (Salary will be commensurate with relevant qualifications and experience)

SCREENING DATE: Screening to begin January 17, 2014

DEFINITION:

This is responsible administrative assistant work in the Division providing project and executive support to the Division Director. An employee in this class/position is responsible for coordinating and communicating with department staff regarding activities related to the operation of the Division, specifically regarding initiation of financial examinations and finalization of the examinations. The position requires utilizing and recommending enhancements to the procedures necessary to ensure statutory and NAIC accreditation requirements are met in relation to exam coordination activities. In addition, an employee in this class provides project support to the Division Director by preparing reports, monitoring schedules, generating data from the National Association of Insurance Commissioners database, and providing requested information relating to financial examinations. An employee in this class is also responsible for making independent decisions on a variety of division related inquiries.

EXAMPLES OF WORK PERFORMED: (Duties and responsibilities may be added, deleted, or changed at any time at the discretion of management, formally or informally, either verbally or in writing.)

Prepares initial correspondence to companies to be examined, sends questionnaires and coordinates access to prior examination work papers for exam teams. Issues warrant for examiners and zone call information into the NAIC exam coordination site. Provides log in information for FTP site and manages site documents as directed by EIC. Tracks progress of all exams and maintains internal exam tracking system so that reports can be generated regarding exam activity, includes maintaining exam archive database. This is done through reviewing reports from audit managers and handling work papers and report files after the fieldwork is complete to ensure review is completed within required timelines. Acts as official timekeeper for field examiners, financial analysts and Examinysts, including initial review of timesheets, documenting deviations from standard workdays, enters time information into SAM II system for processing, and must be able to distinguish between dedicated fund expenses and exam fund expenses. The position also serves as liaison between field staff and Division Director, Deputy Division Director and Chief Financial Examiner. Person is responsible for invoicing insurance companies related to examination reports, actuarial fees, portfolio analysis memorandums and specialist examination consultants. Ability to maintain databases and prepare reports as need for NAIC accreditation interim and full scope reviews. Maintains calendar and schedules meeting for Division Director, Deputy Division Director and Chief Financial Examiner and handles travel arrangements for other professional staff. Handles phone calls and correspondence for Division Director, Deputy Division Director, Chief Financial Examiner and other Department managers as received. Tracks the review status of outstanding filings to ensure reviews are completed within statutory timeframes. Prepares approval certificates for dividends, surplus note payments and other transactions that have been approved by Division Director. Distributes postal mail to division employees as needed. Provides assistance to financial analysts, includes maintaining regulatory filing tracking database, certifying copies, and invoicing companies. Serves as supply manager for both internal staff and field examiners. Maintains exam billing database records for use by the Premium Tax section in their annual review. Provides assistance to Chief Examiner by corresponding to inquiries and maintaining the Charitable Gift Annuities database. Performs other duties as assigned.

EXAMPLES OF REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES:

Excellent organizational and multi-tasking skills are a must. Strong computer skills to utilize a variety of different applications is also essential. Advanced experience with Microsoft Word, Microsoft Outlook, Microsoft Excel and Access programs a must. Previous experience with legal documents is desired. Working knowledge of business practices, procedures and equipment. Working knowledge of the principles and practices of office management. Ability to understand and carry out complex directions and to maintain complex records. Knowledge of research techniques and data sources. Ability to analyze technical information. Ability to

communicate effectively. Ability to work independently, prioritize and carry out assignments without close supervision. Ability to prepare reports and documents from basic calculations and information. Ability to maintain effective working relationships with department staff, insurance company representatives, legislators, attorneys, and the general public.

EXPERIENCE AND TRAINING QUALIFICATIONS:

Four years of office or related clerical experience including one year at an advanced clerical level (Clerk Typist III, Secretary III) or two years above the entry level (e.g. Clerk Typist II). (College coursework may be substituted on a year-for-year basis for the required experience.)

SEND COMPLETED APPLICATION FORM, RESUME AND COPY OF ANY COLLEGE TRANSCRIPTS TO:

**DIFP – Human Resources
Attn: Exam Coordinator
P. O. Box 690
Jefferson City, MO 65102**

EOE: F/M/V/D